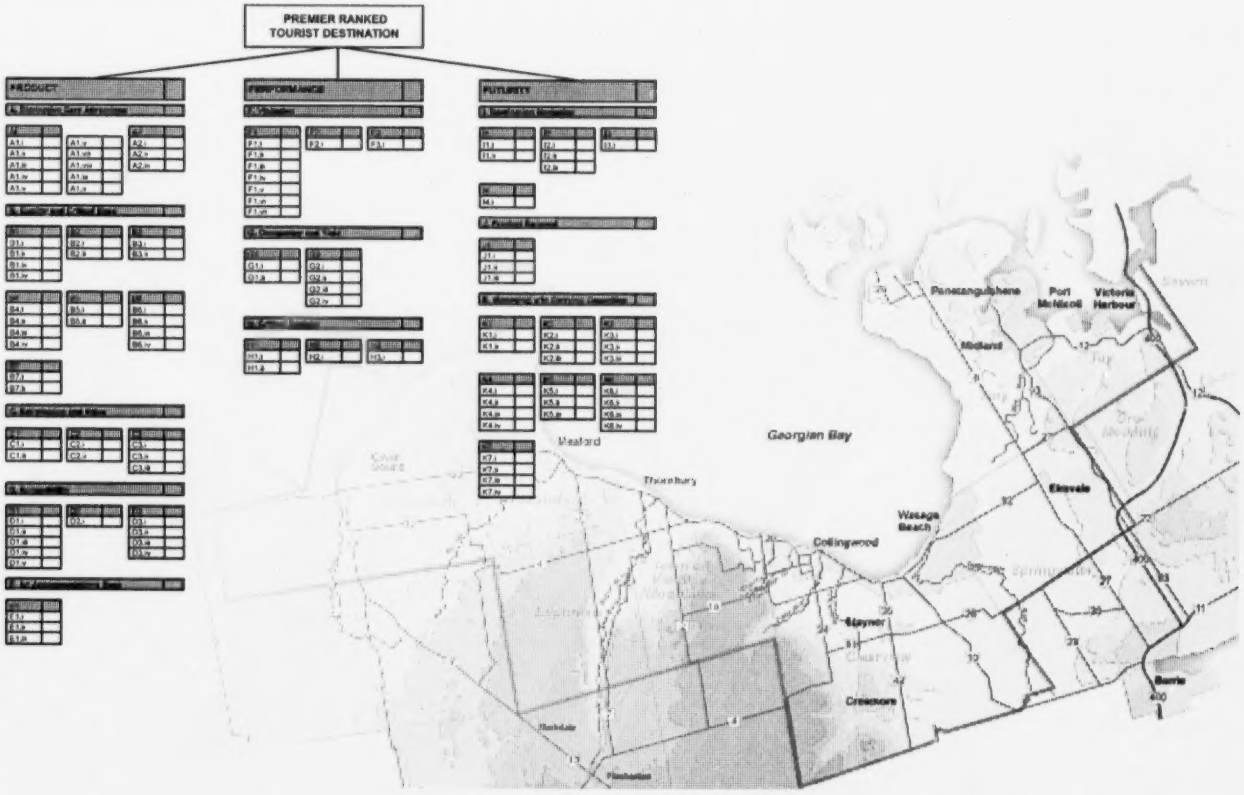
Premier Ranked Tourist Destinations: An Evaluation Framework and Its Testing in the South Georgian Bay Region

SUMMARY



The Tourism Investment and Development Office,
Ontario Ministry of Tourism

MALONE GIVEN PARSONS LTD.

January 2001

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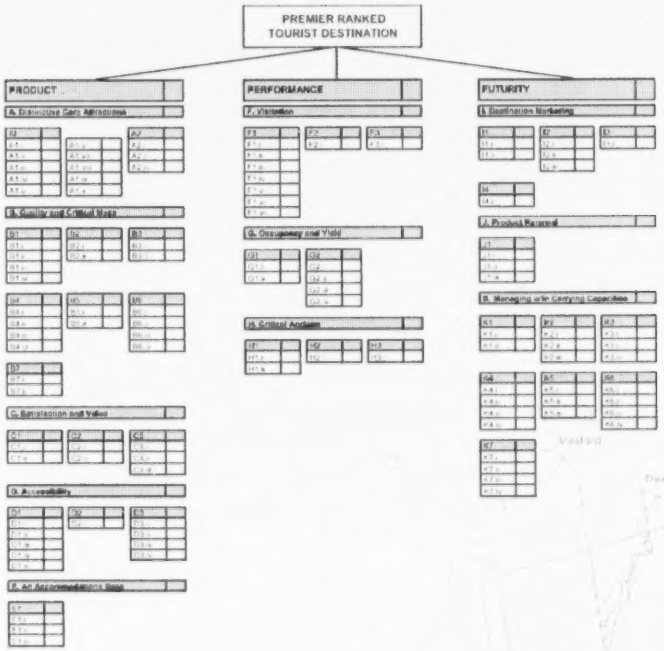

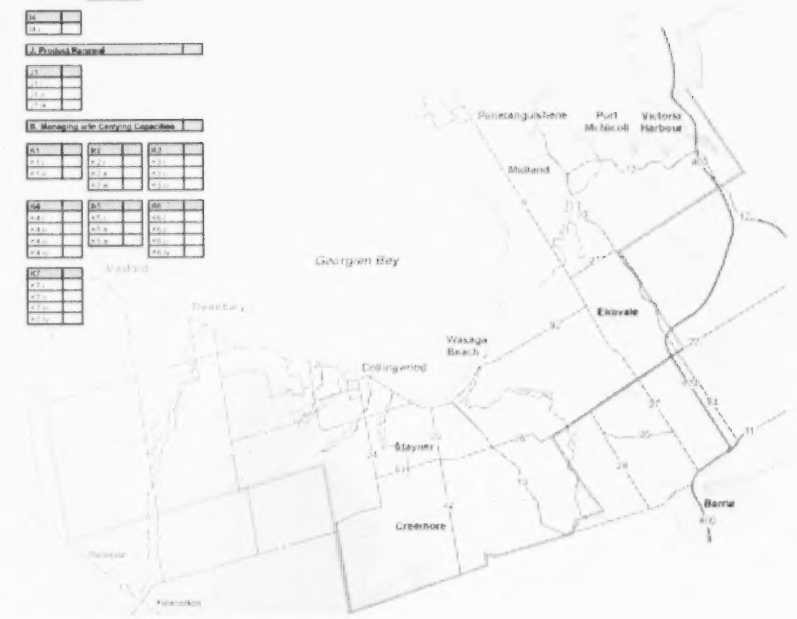

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Prepared For:

The Ontario Ministry of Tourism
Tourism Investment and Development Office
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SUMMARY

INTRODUCTION

The Ontario Ministry of Tourism's Tourism Investment and Development Office (TIDO) retained Malone Given Parsons Ltd. to undertake the study presented in this report. The study was commissioned to:

1. Develop a framework that captures the attributes/factors/conditions needed in order that a tourist destination be perceived as a "premier-ranked" destination; and,

2. Compare the attributes/factors/conditions that exist within the southern shore region of Georgian Bay against this framework and identify what is required, if anything, in order that the Region would be perceived as a premier ranked tourist destination.

The Ministry's primary focus is on developing a framework that is relevant to the whole of the Province. The south Georgian Bay region is used as a test case for assessing the framework's utility in identifying: premier ranked destinations, the elements that contribute to that ranking, and the gaps or opportunities that respectively constrain or enable a destination's place among the premier-ranked.

The study process involved three phases, whereby:

- Phase 1 addressed development of a "Requisite Elements Framework", capturing the elements considered necessary for a tourist destination to be perceived as being among the premier ranked, as addressed in the report's Section 2.0;

- Phase 2 assessed the tourism resource and infrastructure base in place and planned for the south shore region of Georgian Bay, and compared it to the Requisite Elements Framework, as addressed in the report's Section 3.0; and,

- Phase 3 identified gaps, barriers, issues, opportunities and potential partners influencing tourism development (Section 4.0), and concluded with a review of the Requisite Elements Framework in use, and identification of next steps in its development and tourism development in the study region in Section 5.0.

THE REQUISITE ELEMENTS FRAMEWORK

The Framework Development Process

Development of the criteria for a Premier Ranked Tourist Destination was guided by "criteria for the criteria" whereby the framework must be:

- market demand vs. product supply side driven;
- logically and intuitively connected to the elements that make for a premier-ranked tourist destination;
- as relevant to identifying gaps and opportunities and weighing investment decisions about future products as it is to making assessments of a current situation;
- measurable in a transparent, defensible and replicable manner;
- able to stand on its own as a template or tool for use by any Destination Marketing Organization (DMO) or project proponent, for performance assessment at one or a series of points over time, or to identify how and why a particular project is important to the attractiveness of a tourist destination area; and,
- relevant to a "destination area" ie. a complex of attractions and facilities that operate as a natural tourism destination, as opposed to an individual attraction.

Development of the Framework was also guided by:

- a review of literature addressing tourism destination and resource planning and assessment, and managing in the "Experience Economy";
- consultation with key informants representative of ten organizations active in the travel, tourism marketing and product development sectors;
- a review of methodologies used to rank tourist destinations, facilities and services by travel and special interest (skiing and golf) magazines, and of that used by Communities in Bloom to identify its winning communities;
- a review of literature addressing policy and project management frameworks; and,
- discussion with the study Steering Committee at the Ministry of Tourism.

The Requisite Elements Framework

In essence, a Premier Ranked Destination must have attributes with well above average performance, along dimensions that capture destination attractiveness, quality of the tourist experience, and market success. In order for that quality and success to be maintained over time, the destination must also be marketed, renewed, and managed in a sustainable manner.

These essential dimensions can be distilled to Product, Performance, and Futurity. They are more fully articulated as:

THE PRODUCT DIMENSION

A Premier Ranked Tourist Destination provides a high quality tourist experience, enabled through the destination's offerings of:

A. Distinctive Core Attractions;
B. Quality and Critical Mass;
C. Satisfaction and Value;
D. Accessibility; and,
E. An Accommodations Base.

THE PERFORMANCE DIMENSION

The quality of the tourist experience and the destination's success in providing it is validated by:

F. Visitation
G. Occupancy and Yield; and,
H. Critical Acclaim;

THE FUTURITY DIMENSION

and sustained by:

I. Destination Marketing;
J. Product Renewal; and,
K. Managing within Carrying Capacities.

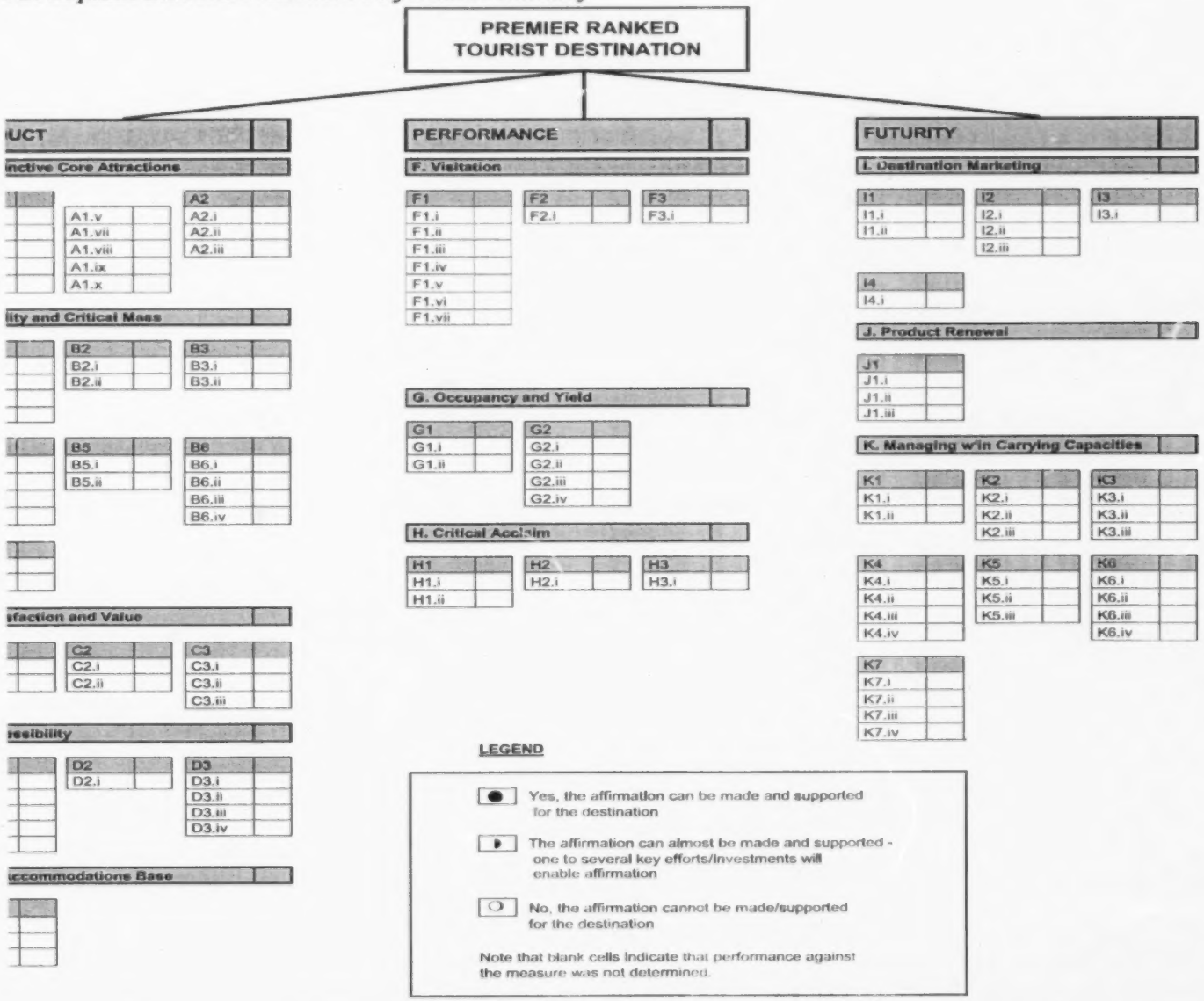
This logical structure and its eleven elements are the backbone of the Requisite Elements Framework. Each element is supported by criteria (36 in total), each of which is supported by measures (105 in total) that lead the user through the analysis and evidence required to substantiate performance against the criteria. Data sources relevant to each measure are also suggested. The criteria and measures are expressed as statements or expectations, which effectively demand "fill in the blanks" proof that a tourist destination can respond affirmatively to the implied question. The Framework is also supported by, and demands completion of, an accompanying Tourism Resource /Opportunity Matrix as a tool facilitating a resource audit. A one page Performance Summary graphically captures a destination area's performance against the nested measures, criteria and elements.

The first page of the Framework is reproduced on the next page to illustrate its dimension/element/criteria/ measures structure, followed by the Performance Summary.

Figure A: Page One of the Requisite Elements Framework

PRODUCT ELEMENTS	CRITERIA	MEASURES	DATA SOURCES
A. Distinctive Core Attractions	**A1.** The destination offers distinctive core attractions which are intrinsically linked to its setting and/or history.	i. A Resource Audit has been completed.	• TIMS • Area Inventory
		ii. The Audit distinguishes core or principal attractions from ancillary or supporting attractions, and identifies the former as: _____.	• Resource Audit
		iii. The core attractions are destination travel motivators on their own and/or operate as part of a complex with the following attractions: _____ in the larger destination region encompassing: _____.	• Resource Audit • Regional Overview
		iv. Opportunities to build on potential complementarities with nearby destinations have been addressed through: _____; which concluded that: _____.	• Specific Study (SS) or Tourism Development Strategy (TDS)
		v. The core attractions are considered to be relevant to a wide/narrow market base characterized as: _____ and estimated at: _____ visits per year in Ontario because: _____.	• SS/TDS
		vi. The core attractions are linked to the setting of the destination in that they: _____.	• SS/TDS
		vii. The core attractions are linked to the history of the destination in that they: _____.	• SS/TDS
		viii. The nearest destination with a competitive or similar offering is: _____, located: _____ km distant.	• SS/TDS
		ix. The subject destination's offering stands out as distinct from competitive offerings because: _____.	• SS/TDS
		x. The subject destination's offering is superior because it is more relevant to tourist wants in the following ways: _____.	• SS/TDS

e B: Requisite Elements Framework-Performance Summary



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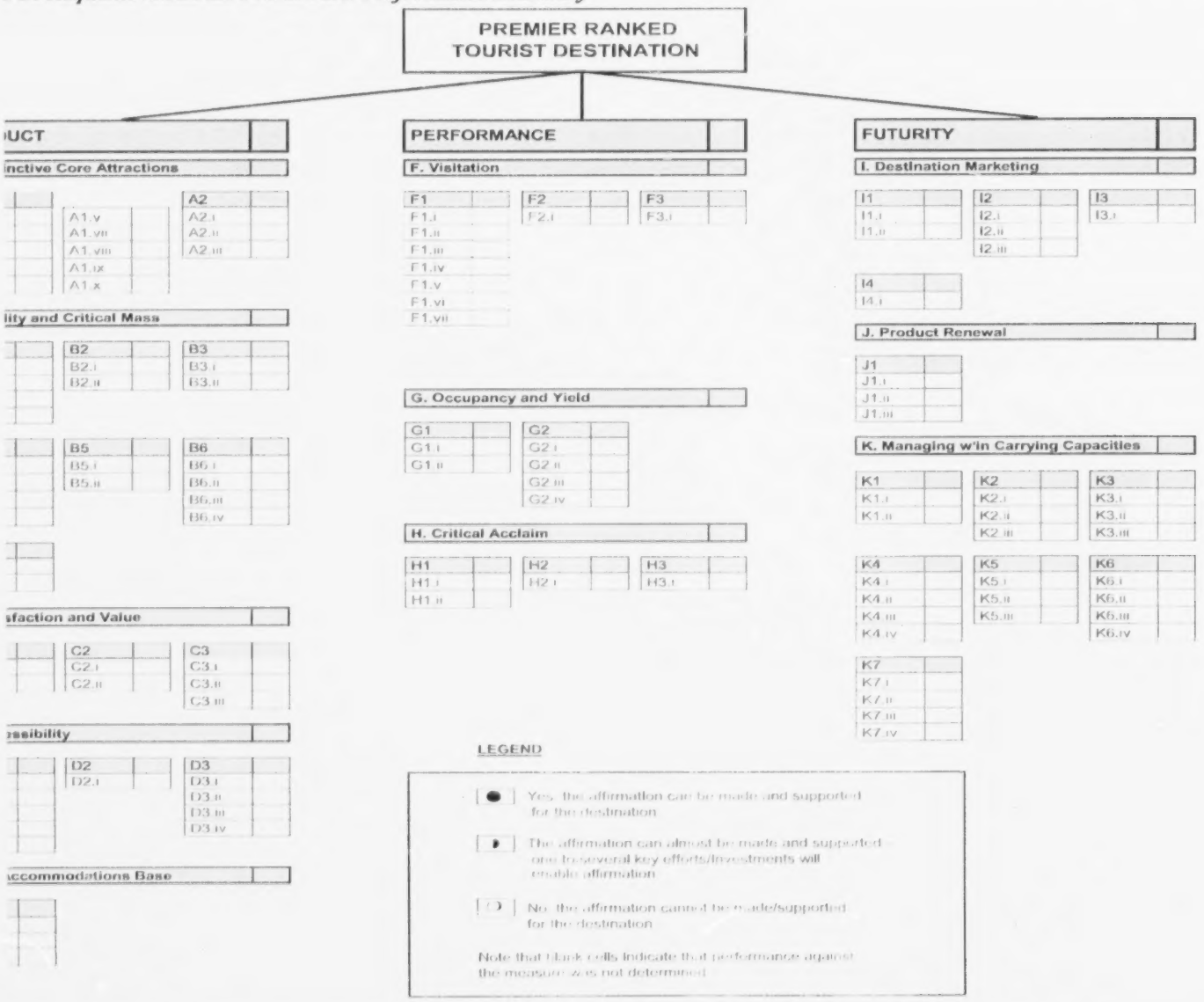


THE SOUTH GEORGIAN BAY TEST CASE

The "attributes/factors/conditions" extant within the south shore region are identified and assessed through an inventory of the tourism resource base, analysis of data on tourist visitation to the study region, and consideration of the region's comparative advantages. The Test Case concludes with the study region being measured against the Requisite Elements Framework. Data sources included Statistics Canada's International and Canadian Travel Surveys, the Ministry of Tourism's Tourism Inventory Management Survey database, brochures and other marketing materials generated by DMO's, and contact with over thirty municipal, provincial and DMO representatives, project proponents and industry observers.

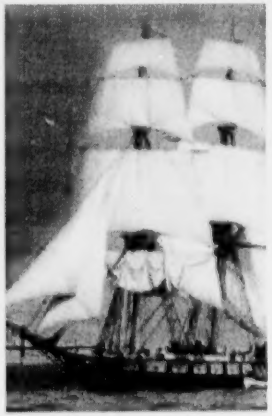
The Study Region

The study region encompasses the south shores of Georgian Bay between Owen Sound and Waubashene, and the major expressions of the Niagara Escarpment, including most of the Beaver Valley. For visitation data capture purposes, the study area was ultimately defined by the harder lines coincident with municipal boundaries of (generally) the first tier of townships south of the Bay, as they were defined in 1991.

The Tourism Resource Base

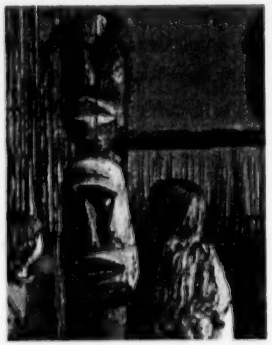
The elements making up the current, pending and proposed tourism resource base are inventoried, tabulated and mapped under the following headings:

- Natural Features, Parks, Preserves and Trails;
- Cultural Heritage Assets;
- Built Recreational Infrastructure;
- Events and Festivals;
- Other Attractions;
- Accommodations Properties;
- Lifestyle Properties;
- Suppliers of Sight-Seeing, Interpretive and Adventure Products;
- Pending and Proposed Additions to the Facility Base;
- Pending and Proposed Additions to the Infrastructure Base; and,
- Other Identified Site Opportunities.



All of these features are presented in Figure C below. Highlights of this inventory include the presence of:

- environmental features definitive of the southern Ontario landscape, the presence of the Province's best known trail systems, and its longest beach;
- some of Ontario's best heritage exposition sites, and some of its best regional theatre;
- Ontario's best skiing, some of its best boating, and one of its best golf resorts;
- a diverse mix of successful events and festivals;
- a limited range of largely summer seasonal other attractions, and a dearth of "weatherproof"indoor activities;
- a long list of largely independent commercial accommodations suppliers, many of them seasonal, a handful of mid-market franchise properties, and no representation by higher end hotel operators;
- a substantial and growing base of recreational/resort oriented condominium properties. These are concentrated in the Collingwood/Town of the Blue Mountains Area, host to some 2,730 units today. There are approvals and plans in place that could bring the study region's count to the order of 12,300 units at build out, including 4,800 new units in the Town of the Blue Mountains;
- a currently small but growing and diversifying list of suppliers of sightseeing, interpretive and adventure experiences;



- a list of pending and proposed projects with the potential to transform the tourist experience in and market attractiveness of each of the region's destination areas. The largest impacts will arise in the Town of the Blue Mountains, host to the Intrawest/Blue Mountain Resorts plans for a new base village and hill-side improvements, three golf/resort proposals for the Castle Glen, Camperdown and Lora Bay areas, and a spa proposal for the Craigleith area;
- significant expansions to road and municipal services infrastructure to enable these and other built improvements; and,
- a list of at least 15 opportunities for other enhancements to the regional tourism asset base, varying from beach and trail expansions to serviced 400 acre development sites.

Highlights of the analysis of visitation statistics include:

- visits by some 2.86 million Canadian travelers in 1999, or 3.9% of domestic visits within and to Ontario;
- relatively low expenditure yields from those visits - a 2.6% share of domestic spending in Ontario;
- at the Grey and Simcoe County levels, tourists from beyond Canada's borders contributing another 5% to total visitation; and,
- very high propensities to engage in outdoor activities, significantly elevated participation in historical and cultural pursuits, very high reliance on private accommodation, and low use of commercial accommodations.

Figure C
South Georgian Bay Tourism Resource Base

CURRENT, PENDING AND POTENTIAL TOURISM RESOURCES & INFRASTRUCTURE

- Parks and Reserves
- Current, Pending and Potential Tourism Resources
- Public and Semi Private Golf Courses
- Public Marinas

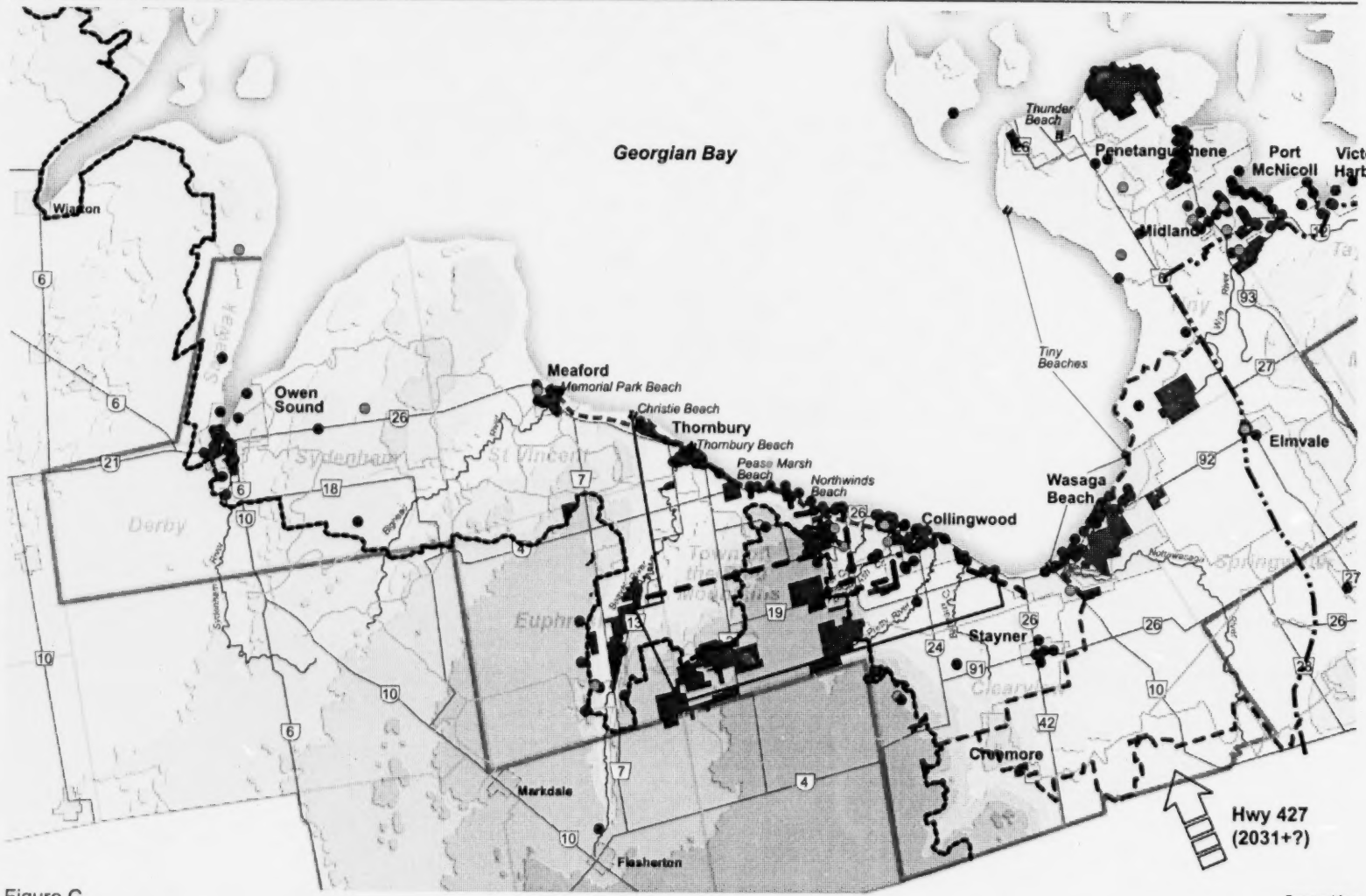
- Study Area
- New Water/Sewer Mains
- New Highways or Road Improvements
- Georgian Triangle Transportation Study Area

Note: Data points are schematic.

Prepared for:
The Tourism Investment & Development Office, Ontario Ministry of Tourism

Prepared by:
MALONE GIVEN PARSONS LTD.

Project: 1090
January 2001



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N

5000 0 5000 10000 15000 20000m

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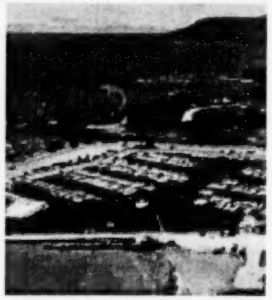
Synthesis: Key Attributes of the Tourism Resource Base and Visitation in South Georgian Bay

It is evident that South Georgian Bay has four key strengths that sustain its current attractiveness, and position the whole of the region for substantial growth in visitation:



- the quality of its resource base and the opportunities it provides for outdoor recreational pursuits;
- the quality of its cultural heritage resource base;
- the fit between these attributes and the current and emerging wants held by tourists; and,
- the region's proximity to the large and growing population base in southern Ontario and across the borders at Niagara, Windsor and Sarnia.

It is also evident that the region is not performing especially well today. Notwithstanding its 4% share of total domestic visitation to and within Ontario, south Georgian Bay is:

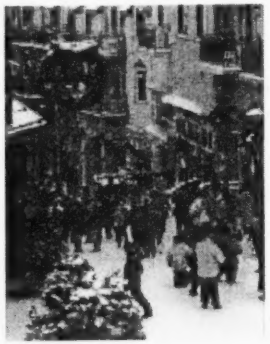
- a low yield destination, lacking the attractions, beds and quality in the accommodations sector to attract higher spending overnight visitors who are not owners of private cottage, chalet or condo accommodations;
- still lacking in depth and breadth of activities and supporting facilities and services, particularly those of a "weatherproof" nature, when compared to other leading resort destinations;
- a regional market destination, unable as yet to significantly penetrate markets from beyond the Provincial borders; and,
- still a highly summer oriented seasonal destination, notwithstanding the relative strength of winter and shoulder visitation to the central part of the region.

At the same time, the coming changes to the resource base, if the necessary services can be economically put in place, are highly responsive to regional gaps, and market wants:

- Intrawest's plans will quickly bring a substantial increase in bed supply, attractive to higher spending segments while building a village offering easy access to an expanding set of activities and experiences;
- other proposals are being advanced, particularly for golf properties, with comparable impacts to the market appeal of the region;
- there are opportunities for cross marketing enabled by the propensities for active people to be engaged by more cerebral pursuits, and vice versa;
- other independent operators are coming forward with other attractions, activities and accommodations products; and,
- there are opportunities to further lever these investments to create linkages and visitor flows to more of the region.

On balance, if issues and barriers can be resolved, the region is poised on the cusp of a substantial transformation into a significantly more attractive and productive tourist destination - one of Ontario's pre-eminent resort destinations for more active outdoors pursuits.

A Premier Ranked Destination?



The region's performance against the Requisite Elements Framework was measured as for a unitary area with one set of characteristics, vs. discrete evaluations for what are clearly three "natural" destination areas within the larger region. The scale of the region and its asset base necessitated a higher level application of the Framework than would be expected of a singular destination area. Nonetheless, application of the Framework reveals and highlights attributes which are generally accepted as being strengths, weaknesses, gaps or opportunities characteristic of the sub areas if not the region as a whole. The region's evaluation shows the following performance highlights:

- a region with a series of compelling and distinctive core attractions, most all of which arise from the quality of the natural resource base or the quality of the facilities informing our interest in the area's role in our history;
- a relatively rich mass of attractions and services, but one which is still missing elements furthering "weatherproofness", access to off-season activities, and fulfilling market expectations for higher end accommodations, dining, entertainment and shopping options;
- an accommodations base lacking representation by higher end operators, and lacking beds generally in its east and west subareas. At the same time, there is relatively little use made of commercial accommodations by area visitors, due in large part to the extensive private cottage/chalet/condo accommodations base;
- relatedly, average occupancy rates are in the high 50's, destination expenditures index to roughly two thirds of the region's share of Ontario visitation, and penetration of markets from beyond Ontario's borders is weak; all despite strong visitation and regional market recognition of the quality of core assets;
- a need for the region's municipalities, suppliers and DMO's to invest in tourism development and marketing strategies which reflect evolving organizational structures, and the market shifts coming with new product development;
- while product renewal has not historically been a strong suit throughout the region, significant new investment is being made or committed, such that subareas and the region as a whole are on the cusp of a significant new presence in the tourism market place;
- managing within administrative, economic and environmental capacities represents the greatest challenge across the region.

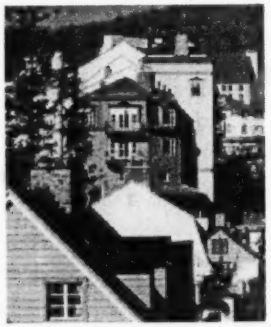
Ultimately, as recorded on the Performance Summary on the following page, the south Georgian Bay region is considered to be clearly positioned among Ontario's premier ranked tourist destinations. This ranking arises from the strength of its asset base and the range of supporting facilities and services that have evolved around it, incomplete as that suite may be today. Completion of the new product additions slated for the area will firmly place south Georgian Bay as one of Ontario's pre-eminent resort destinations for active outdoor oriented pursuits.

GAPS AND OPPORTUNITIES

The inventory and analysis revealed the following Gaps, Barriers and Issues:

Gaps

- the accommodations base is lacking presence and depth throughout the study region, however the creation of 1,200 new higher end condo-hotel units at the Blue Mountain area will represent a very significant addition to that locality;
- significant new hard services infrastructure is required to enable approved and proposed development in the Town of the Blue Mountains;
- critical mass/product gaps are more pronounced in the western and eastern parts of the study region, and appear to constrain opportunities for desired hotel projects, particularly in the winter season;
- "weather-proof" activities for tourist visitors are generally lacking through most of the study region, particularly in the amusement, entertainment, cultural exposition and entertainment realms;
- multi-use trails nodes and attractive connections to key service areas are missing elements through most of the study region;
- waterfront access is insufficient to respond to growing demands in Collingwood and the Town of the Blue Mountains, and there is currently no coordinated or balanced effort at improving that access;
- centralized or distributed venues facilitating shopping for and booking of destination activities are not available;
- tourism development strategies need to be prepared or updated throughout the study region, and will need to assess and respond to the coming changes to the Blue Mountain area.



Barriers

- funding formulae for infrastructure expansions in the Town of the Blue Mountains assume a 30% contribution from higher governments and an extremely high growth rate - departures from either assumption will increase development costs and process uncertainties accordingly;

Figure D: Requisite Elements Framework-Performance Summary for the South Georgian Bay Study Region

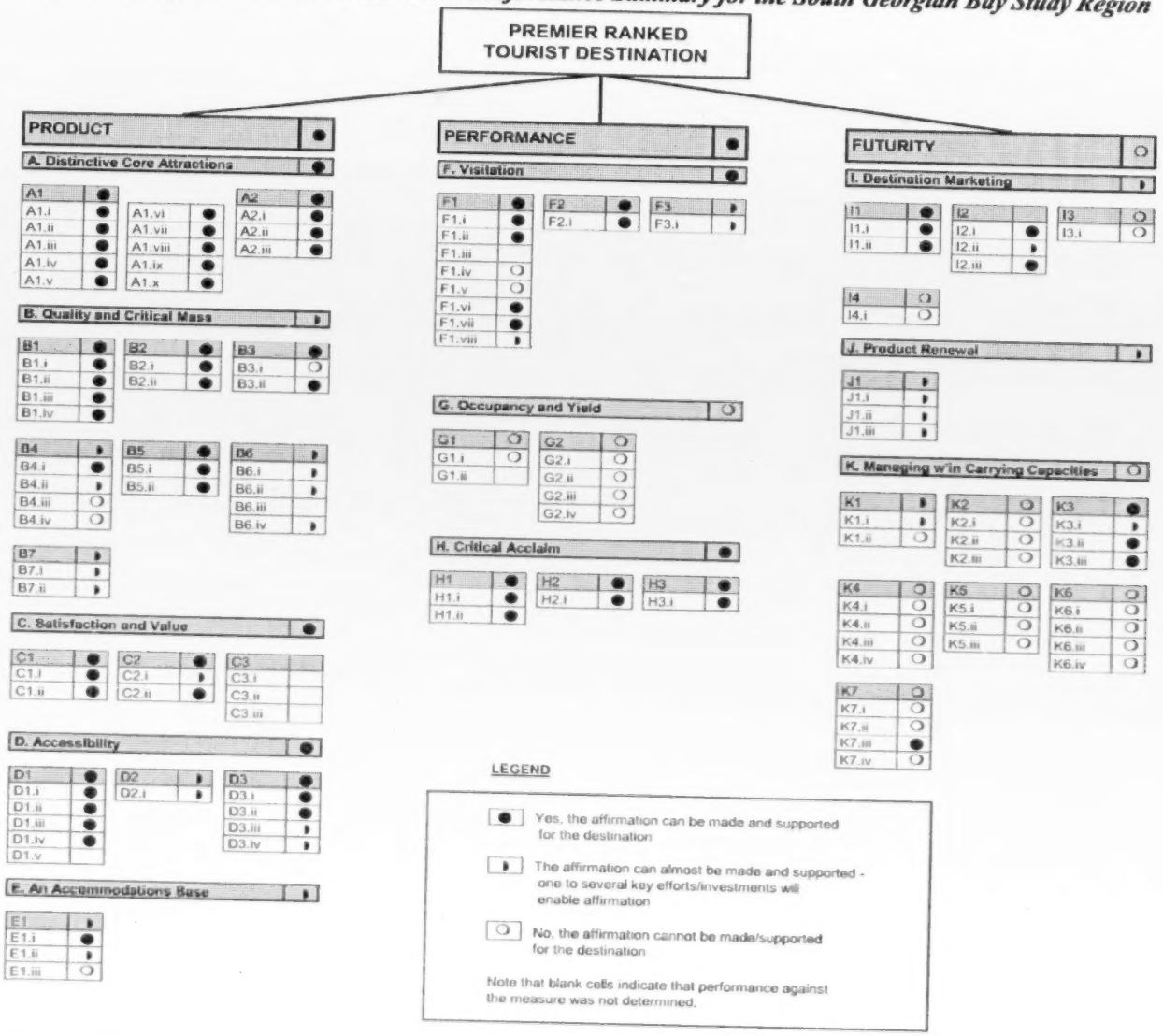
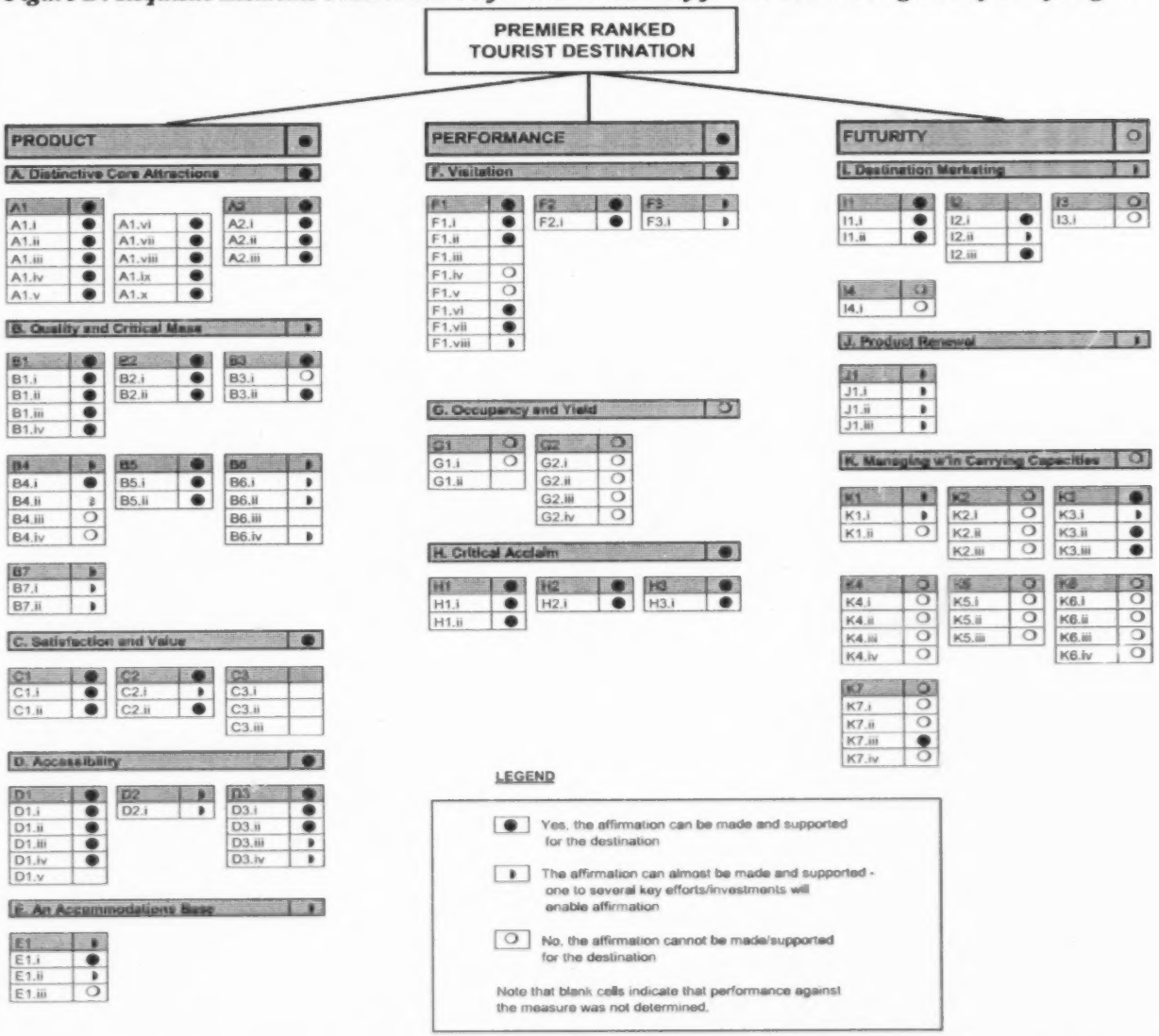

PREMIER RANKED TOURIST DESTINATION
PRODUCT
A. Distinctive Core Attractions
A1 A1.i A1.ii A1.iii A1.iv A1.v A1.vi A1.vii A1.viii A1.ix A1.x
A2 A2.i A2.ii A2.iii
B. Quality and Critical Mass
B1 B1.i B1.ii B1.iii B1.iv
B2 B2.i B2.ii
B3 B3.i B3.ii
B4 B4.i B4.ii B4.iii B4.iv
B5 B5.i B5.ii
B6 B6.i B6.ii B6.iii B6.iv
B7 B7.i B7.ii
C. Satisfaction and Value
C1 C1.i C1.ii
C2 C2.i C2.ii
C3 C3.i C3.ii C3.iii
D. Accessibility
D1 D1.i D1.ii D1.iii D1.iv D1.v
D2 D2.i
D3 D3.i D3.ii D3.iii D3.iv
E. An Accommodations Base
E1 E1.i E1.ii E1.iii
PERFORMANCE
F. Visitation
F1 F1.i F1.ii F1.iii F1.iv F1.v F1.vi F1.vii F1.viii
F2 F2.i
F3 F3.i
G. Occupancy and Yield
G1 G1.i G1.ii
G2 G2.i G2.ii G2.iii G2.iv
H. Critical Acclaim
H1 H1.i H1.ii
H2 H2.i
H3 H3.i
FUTURITY
I. Destination Marketing
I1 I1.i I1.ii
I2 I2.i I2.ii I2.iii
I3 I3.i
I4 I4.i
J. Product Renewal
J1 J1.i J1.ii J1.iii
K. Managing w'in Carrying Capacities
K1 K1.i K1.ii
K2 K2.i K2.ii K2.iii
K3 K3.i K3.ii K3.iii
K4 K4.i K4.ii K4.iii K4.iv
K5 K5.i K5.ii K5.iii
K6 K6.i K6.ii K6.iii K6.iv
K7 K7.i K7.ii K7.iii K7.iv
LEGEND
Yes, the affirmation can be made and supported for the destination
The affirmation can almost be made and supported - one to several key efforts/investments will enable affirmation
No, the affirmation cannot be made/supported for the destination
Note that blank cells indicate that performance against the measure was not determined.

Figure D: Requisite Elements Framework-Performance Summary for the South Georgian Bay Study Region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B3 B3.i B3.ii
B4 B4.i B4.ii B4.iii B4.iv
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B7 B7.i B7.ii
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PERFORMANCE
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H3 H3.i
FUTURITY
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No, the affirmation cannot be made/supported for the destination
Note that blank cells indicate that performance against the measure was not determined.

- the small labour pool available to the manufacturing, construction and service sectors in the Town of the Blue Mountains and Collingwood areas, housing affordability and worker transportation issues are seen as a potential threat to the viability of the manufacturing economy and a constraint to expansion of the tourism economy in the subarea;
- the location of the sewage treatment plant on the harbourfront in Collingwood reduces the attractiveness of use and development in an important nodal site in the study region;
- an Ontario Municipal Board ruling which expires in 2003 constrains potential redevelopment opportunities at the Canadian Tire site on the Collingwood waterfront;
- natural resource/process conservation values may preclude creation of a protected deeper water channel to the Nottawasaga River mouth and a riverside marina at Wasaga beach; and,
- access and transportation constraints will need to be addressed to enable the proposed waterpark/condo/hotel project to proceed in Penetanguishene.

Issues

Sustainable management of an expanding tourist economy is hampered by several "disconnects" or gaps between what logically could happen to meet various objectives, and what appears destined to occur without a change in direction:

- The south Georgian Bay region is considered to be clearly positioned among Ontario's premier-ranked tourist destinations. Completion of the proposed new tourism product additions and its associated infrastructure will place the region as one of Ontario's pre-eminent resort destinations for active outdoor oriented pursuits. Making this happen will require a confirmation of the region's political and administrative bodies' commitment to tourism development.

- Proposed investments in the Town of the Blue Mountains will yield substantial increases in visitation, assessed values and service demands. Much of the increased activity and assessment will occur in Grey County while much of the demand for easier transportation, housing and day to day services will be felt in Simcoe County. Fiscal impact analyses carried out by C.N. Watson and Associates for Intrawest estimate total annual fiscal benefits (upon build out) to the Town of the Blue Mountains and Grey County entities in the order of $2.6 million per year, none of which will flow across the County line, and none of which will necessarily flow to solutions to potential needs for (for example) employee housing or transportation. Short of the typically contentious redrawing of municipal borders, there is currently no mechanism to connect resources, cash flow and unfunded needs.

Investment Opportunities and Potential Partners

After identifying suggested criteria for public investment in tourism assets and infrastructure, the report identifies the following capital investment opportunities and potential partners:

- development of hard water, sewer and transportation infrastructure services wherever it will enable further tourism oriented development or improve the visitor experience, with potential partners and/or investors including municipalities and developers;
- development of multi-use trails nodes and key linkages, with potential partners and/or investors including municipalities, conservation authorities, benefitting developers and commercial interests and private sector sponsors;
- development of the Escarpment Centre Ontario (ECO) in Owen Sound, with potential partners and/or investors including municipalities, foundations, conservation authorities, commercial interests and private sector sponsors;
- development of additional conference space and aqua park facilities at Blue Mountain, with potential partners and/or investors including Intrawest and Blue Mountain Resorts;
- development of additional access to the water's edge in the Town of the Blue Mountains/Collingwood sub area, with potential partners and/or investors including municipalities, conservation authorities, and benefitting developers and commercial interests;
- development of the archaeological and cultural heritage interpretive and expositional opportunities at the "Heritage Ridge" area in the Town of the Blue Mountains, with potential partners and/or investors including area municipalities, foundations, conservation authorities, benefitting developers and commercial interests and private sector sponsors;
- improvements to the public open spaces on the waterfronts in the study region's centres, with potential partners and/or investors including municipalities, foundations, conservation authorities, benefitting developers and commercial interests and private sector sponsors;
- development of/improvements to transient dockage for boaters and moorage for cruise ships, with potential partners and/or investors including municipalities, benefiting developers and commercial interests;
- development of theatre and expositional space in any of the study region's centres, with potential partners and/or investors including municipalities, foundations and private sector sponsors; and,
- development of model on-line systems for presenting and buying activity options within a destination area, with potential partners and/or investors including DMO's, suppliers and hardware/software sponsors.

FRAMEWORK REVIEW

Framework

- the Requisite Elements Framework is considered to be a powerful tool for identifying a destination's distinctive offerings and the strengths, weaknesses, gaps and opportunities operating along the dimensions considered critical to describing its current and future role in the tourism marketplace;
- it is market driven, focusing on the quality of the tourist experience, market performance, and the sustainability of a market presence;
- it is relevant to the elements that enable premier level performance in the marketplace, and to decisions about directions to pursue into the future;
- the Framework is measurable, and enables transparency, defensibility and, if not perfect replicability, at least very clear identification of the measures and reasons underlying any differing judgements;

- it is best applied to self contained, "natural" destination areas, rather than larger regions including two or more such areas;
- in use, a positive affirmation to a particular measure, criterion or element does not mean that further improvements along the particular dimension are not warranted or worthy of investment; such "yes's" are however strongly indicative of the presence of a richer or more productive context or a better managed area than would otherwise be the case;
- a "yes", "almost" or "no" response to any particular expectation will not always be illuminating or determinative of performance against it, and it will often be necessary to understand the specific context in order to come to a judgement of performance;
- similarly, situation-specific judgement will often be necessary in determining how to rate a destination area at the criteria or element levels, given varying degrees of performance against individual measures or criteria respectively;
- these latter points are seen as inherent features of a framework designed to be used by a variety of individuals or groups and divorced from application to a large survey sample or by a trained group of judges who can be relied upon to use the framework in a consistent manner. Familiarity with the Framework gained through its repetitive use will make such judgement calls easier to make and defend to others.

Lessons Learned

- application of the Framework depends on there being a good inventory of the tourism product and services on offer in a destination area. This data is largely available from the Ministry's Tourism Inventory

Management Survey (TIMS) data base, but that data set needs to be updated on a regular basis, with all information fields completed;

- data fields and data entry processes for the TIMS database need to ensure that address fields are maintained as distinct entities in a format that facilitates geo-coding for integration in a GIS data base - they must include a street address or civic (emergency services) identifier wherever possible;
- efficient geo-coding of asset locations also requires that digital map products are current and include addressing capabilities. This is not the case with the Ministry of Natural Resources' Ontario Base Map Series, requiring its augmentation by municipal or private sector map products; and,
- any informed application of the Framework to the offerings of a particular destination area has to incorporate contact with key municipal, DMO, supplier and developer stakeholders.

NEXT STEPS

The Requisite Elements Framework

- broader application and use of the Framework would be enabled by integration of the TIMS data base into a standardized GIS data base able to generate current maps of the tourism infrastructure in place in destination areas of any scale, and made readily available to stakeholders in tourism development;
- there are a number of data sets held by such agencies as the Ontario Ministry of Tourism (TIMS), the Ontario Ministry of Transportation (traffic counts) and Statistics Canada (CTS, ITS, Business Registry and others) which incorporate municipal boundaries into their geographies. Tourism resource analysis and development planning would be greatly aided if these could be packaged at levels coincident with regional and more local scale DMO geographies, as part of the standardized GIS data base identified above. As an intermediate step, these data sets need to be made readily available on a timely basis and at the appropriate geographic level;
- over time, such packaging would be aided by development of a systematic approach to identifying the visitation divides and origin markets which define "natural" tourist destination areas;
- the Framework should be packaged as a stand-alone product for self assessment by destination areas, supported by "How-to" workshops;
- further review and integration may be required if the Framework is to be used in the context of funding decisions under government investment programs;
- the development, structure and content of the Framework should be packaged as a journal article for dissemination to the larger academic and supplier communities; and,

- criticisms and lessons which emerge through broader review and use of the Framework should be integrated into an evolving product.

Study Region

- subareas within the larger study region should self assess their performance against the Requisite Elements Framework as a tool for the identification of gaps, weaknesses and opportunities as input to development of current tourism development strategies, and the identification of investments and new partnerships critical to implementing those strategies;
- a task force should be struck to examine development & approvals issues, their implications to Provincial objectives and the need for and nature of any corrective actions considered appropriate;
- a task force should be struck to examine issues of development costs and benefits and how these might be dealt with in a balanced and equitable manner across municipal boundaries, with a view to improving product attractiveness, performance and futurity throughout the study region.

Concluding Comments

The study described in this report was undertaken for two reasons:

1. To develop a framework that captures what makes for a Premier Ranked Tourist Destination; and,

2. To measure the south Georgian Bay region against that framework to test its utility, and to identify the status, gaps and potential of that area.

The study has defined a framework that fulfils the criteria established to shape its development. It stands as a tool or template which can be adopted for use by any destination area to assess its own place in the Ontario tourism marketplace, its strengths and weaknesses, and possible directions to a more productive future.

The utility of the Requisite Elements Framework has been confirmed by its application to the south Georgian Bay region. It has characterized an area with considerable strengths and opportunities, poised on the threshold of a significant evolution to a new order of market attractiveness, with a number of new investment opportunities which could further improve its market draw identified. Application of the Framework has also revealed significant weaknesses, and the prerequisites critical to realizing that new market presence.

The study process has also confirmed the value of the Ministry of Tourism's TIMS database, as a basic tool in comprehending the Province's tourism facility base. The study has identified ways in which it can be made more robust, and more functional to its potential users. The process has further highlighted the opportunity to link data to locations through a Geographic Information System (GIS), and future opportunities to add to the utility of a GIS through integrating more, and more current, data sets.

On the strength of these outcomes, the study should contribute to the future development of tourism throughout Ontario and in the south Georgian Bay study region.